

REQUEST FOR PROPOSAL
New Jersey Historic Trust
2012 Capital Needs Survey Report

The New Jersey Historic Trust, an agency affiliated with the Department of Community Affairs, State of New Jersey, has recently conducted a statewide survey to identify the capital construction needs for historic sites owned by either government or non-profit organizations that are listed and/or eligible for listing in the New Jersey/National Register of Historic Places. As the entity charged with administering the bricks and mortar grant funding for historic preservation, the survey was designed to assist in agency planning for the next decade. The Historic Trust last conducted a state wide survey in anticipation of awarding its first capital grant, in 1990. Using the raw data from these two surveys, the Trust would ultimately like to publish a report that both documents the twenty-two year legacy of support for historic preservation as well as identifies future preservation needs and how the program might evolve to meet those identified needs. This Request for Proposal is divided into two parts, the first being research and analysis, and the second part being the preparation of a narrative report, suitable for publication. Both assignments are made part of this REQUEST.

QUALIFICATIONS

The New Jersey Historic Trust is seeking proposals from a professionally qualified individual or a team of professionals having expertise in historic preservation policy and preservation history, fully versed in New Jersey's historic preservation programs, who is also an established author and writer. Expertise in analyzing economic data to identify trends with respect to public policy development preferred. Ideally the successful candidate or qualified team would have written and produced similar documents that successfully synthesized a broad spectrum of events/topics/trends. Proposals should include qualifications for each team member and specify tasks allocated to each.

In addition to professional qualifications, the successful consultant shall:

- Demonstrate general working knowledge of the historic preservation movement
- Demonstrate knowledge of public policy as it relates to historic preservation
- Demonstrate communication ability and provide writing samples; include samples that illustrate tone and style
- Provide work samples that demonstrate ability to research, analyze and communicate/compile results of the research in narrative form for general consumption
- Demonstrate expertise in working with publishers, and/or self-publication, working with editors, selecting photography suitable for publication

Proposals will be evaluated based on consultant qualifications and detailed approach to this request.

(Note: Writing samples will be returned at the written request of the consultant.)

RESEARCH AND ANALYSIS

The Trust has initially identified certain trends that require additional research and analysis in order to fully evaluate the Trust's impact in preserving New Jersey's historic resources. While the information collected in the Capital Needs Surveys conducted in 1990 and 2012 will be the primary source data, additional data collection will be required for a thorough analysis.

Repositories might include (but not be limited to) county historic preservation grant giving agencies, the NJ Historic Preservation Office, the NJ Housing and Mortgage Finance Agency, and the NJ Economic Development Authority.

Specific research topics/storylines are as follows:

CONSTRUCTION DATA

- The data from the 2012 Capital Needs Survey is currently in its raw state. The survey results should be organized, interpreted and analyzed in order to demonstrate the current level of fiscal need for construction projects for historic resources. The 2012 survey results should be compared and contrasted with the 1990 survey results, and important trends and changes should be discussed.
- Since the first grants were awarded, the Historic Trust has impacted nearly five hundred resources and awarded over \$133M in matching grants. Many of the historic sites identified in 1990 have evolved over time and spent much more than first predicted. Quite a number of sites that have been funded in the past 22 years were not included in the survey and have been added to the NJ Register of Historic Places in recent years. We would like to track the success of this program through the development of several case studies (a minimum of 10). Case studies should be diverse in terms of resource type, geography, end use, etc. A number of grantees have already been contacted to provide background for a potential case study.
- Since the first capital grants were awarded in 1990, all 21 New Jersey counties have passed referendum to levy taxes for open space, farmland and/or historic preservation. A number of counties routinely set aside money for historic preservation and offer a grant program. How much funding has been generated for historic preservation from these funds? Is there any correlation between Trust funded projects and counties where these programs exist?
- In 1990, about one-half of the needs that were identified were attributable to state owned historic sites. State owned historic sites were able to apply for Historic Trust funds in the early years of the program, however with the passage of the Garden State Preservation Trust, the state was excluded. In 2007 and 2009, with the passage of the bond referendum, the State was again able to directly apply for historic preservation matching grants. However, in 2006, the State of New Jersey passed a referendum to redistribute 4% of the existing corporate business tax (CBT) to NJDEP for capital

development of parks and historic sites. The first distribution was in January 2007. What impact has this stable funding had on capital development and for those needs originally identified in the 1990 survey? Given that more than \$120M in capital need was identified by the NJDEP for historic site development in the 2012 survey, what impact might this have on the CBT and future funding for the Historic Trust?

POLICY DATA

- In 1997 the economic impact of the Trust's program was documented in a study prepared by Rutgers University. This initial study has never been updated formerly, and while it is not our intent to update this study at this time, we have continued to collect data on job creation and private money leveraged by this program that may be useful in documenting the impact this program has had on the economy and in justifying the continuation of support for historic preservation.
- Grassroots efforts to preserve buildings have often resulted in acquisition of a historic site, with a traditional non-profit ownership structure to steward the resource. This may not be the most financially sustainable method to preserve historic resources. One very under-utilized tool that exists is the acquisition of easements to protect and preserve property in perpetuity. The environmental community has been very adept at leveraging privately owned property with available financial incentives to preserve land. The Historic Trust is unable to use its funding either to leverage acquisition or for purchasing easements, yet in the long term, this might be the most fiscally attainable path for preservation. Research is needed to substantiate this claim and to begin to quantify the need.
- The Historic Trust's programs have predominantly benefited properties in public and non-profit ownership. Certain public programs that finance capital construction sometimes incorporate the rehabilitation of existing buildings. Collecting data and criteria from existing finance programs may help in identifying where the Trust might be most effective in promoting reuse of existing buildings to provide housing and other economic development while helping to foster better preservation.

NARRATIVE

Using the 1990 Capital Needs Survey as a guide, prepare a written narrative, approximately 50 - 60 pages in length, not including the appendix, suitable for publication by the Historic Trust. Narrative should include representative case studies highlighting not only the direct impact of Trust funding but the economic benefits of preserving historic sites. Using the research topics cited above, the narrative should weave the Trust's work into the broader context of historic preservation in New Jersey. Develop and provide graphs, charts and or other illustrative materials as may be needed to convey the information. Narrative tone should be appropriate for a general audience.

Suggested Table of Contents

Executive Summary

Historical Overview

[State of Ruins article, passage of bonds in the 1990's, stable funding 1998 – creation of Trust Fund, license plate & Heritage Tourism, 2007 & 2009 bonds]

Accomplishments (1990 – 2012)

[case studies of projects that were mentioned in the 1990 survey and have been completed (minimum of 10); larger projects (new historic resources) that were never even envisioned in 1990 (Ellis Island, Craftsman Farms, Schooner/Bayshore Discovery, etc.)]

Funding for preservation in New Jersey today

[CBT, county programs, hotel/motel tax, cultural trust, Save America's Treasures, private philanthropy; overview of the programs and how has that impacted preservation]

The Need – goals, purpose and methodology of the survey, summary of survey findings; analysis; exploration into new and/or underutilized routes and strategies for preservation (such as easements, adaptive reuse) and their need and viability, based on survey and research findings

Survey Needs and Examples

Conclusion – any new needs identified? Role and relevancy of funding for the next generation to be developed in cooperation with NJHT

Appendix

- survey results
- Capital Needs Survey Form
- Credits

Expenses for graphic presentation, printing, and/or web design are not a part of this scope. NJHT will assume responsibility for final layout, publication and distribution. NJHT will submit final narrative for fact checking and edit and assumes the author will make any final revisions, if necessary, prior to publication.

Deliverables & Timetable

It is anticipated that this project should be completed within six months.

- Research & Analysis file
- Draft narrative for review – three months
- Final narrative - four months
- Edited and approved narrative – six months (the author will review the document after it has been fact-checked and edited and be available to answer questions and/or to make final revisions)

Available Data

Some, but not all, of the data required to write this narrative is readily available. These documents include:

- 1990 Capital Needs Survey
- 2012 Capital Needs Survey
- NJ Historic trust project files <http://highpoint.state.nj.us/dca/njht/funded/>
- Rutgers University Economic Impact Study
<http://highpoint.state.nj.us/dca/njht/publ/partpros.html>
- Heritage Tourism Master Plan <http://highpoint.state.nj.us/dca/njht/touring/plan/>

Proposals from qualified professionals must be received at the Trust office, Room 603, P.O. Box 457, 101 South Broad Street, Trenton NJ 08625-0457, by _____ 2012, at 4:00 P.M., including curriculum vitae, proposed fee schedule, and all required public bidding documents also attached. UPS and Federal Express overnight deliver should be addressed to New Jersey Historic Trust, 6th Floor, 101 South Broad Street, Trenton NJ 08608.